

# External Observation Instruments

Tools to Analyze Comprehensive Sexuality Education (CSE) Teaching Competencies



**FÒS FEMINISTA**

International Alliance  
for Sexual and Reproductive  
Health, Rights, and Justice

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*Image by Amy Maitland | @amymait*

# I. Introduction

Teaching competencies play a fundamental role in achieving and guaranteeing quality Comprehensive Sexuality Education (CSE). CSE does not depend solely on a good curriculum/training plan or institutional recognition or support. Rather, it also depends on the educator's performance and the educational tools available to them.

In general, competencies to teach CSE are not considered in evaluations of CSE work conducted in educational institutions (schools) or by organizations (within or outside of schools). As a result, the opportunity to strengthen teaching competencies is lost, and with it, ensuring that the CSE that is taught is appropriate and relevant for the target audiences. This could hinder the desired impact of changes in the behaviors and attitudes of adolescents and youth.

For these reasons, we developed a series of external observation instruments for evaluating CSE educators' teaching competencies.

The objective of these instruments is to identify the strengths and weaknesses of the work conducted by the facilitators of CSE programs. In turn, this will contribute to improvements in their teaching practices and, by extension, the results of their CSE programs.

## What is the purpose of the external observation instruments?

The goal of this series of instruments is to establish an educational, constructive, and transformative process to support and promote the analysis of teaching competencies. This analysis will provide educators with clarity regarding how to improve and develop their competencies.

As with other educational processes, because the competency analysis is a complex issue, it requires multiple readings and methodological approaches. These approaches are not mutually exclusive, and they allow us to learn about different dimensions of the process and meet the specific needs of institutional development.

## Methodological approaches for the analysis of CSE teaching competencies

The goal of the external observation (as part of a more extensive process) is not to issue individual assessments but to identify the strengths and weaknesses of the actors involved. The objective is to define plans to improve their competencies and provide greater quality CSE. Therefore, external observation is not supervisory (the traditional approach of evaluation), rather it encourages training and continuous improvement.

For these reasons, the analysis of CSE teaching competencies requires a series of steps or stages which draw from a self-assessment conducted by the educator. This allows the educator to become familiar with the criteria that will be observed externally. After employing the external observation instruments, we recommend developing and implementing an annual improvement plan. After this period has passed, a new evaluation cycle can take place to understand the extent to which the competencies have been developed and whether the goals defined in the plan were reached.

As with any analysis process, it is important to avoid all types of bias (systematic errors) that may be conditioned by the instrument, by the type of implementation, and by the profile of the person conducting the analysis, etc. The systematic errors that may emerge from the analysis process may influence the actions to be developed in the future and—in a certain sense—the formative and transformative potential of the entire process could be lost.

## How does the Handbook of Tools to Analyze CSE Teaching Competencies connect to these external observation instruments?

As previously mentioned, both instruments are independent but complementary. The person implementing the external observation instruments must first read the Handbook of Tools to Analyze CSE Teaching Competencies. This will allow the person to not only understand the process of developing the instruments, but also the interest in using the competency approach, among other relevant theoretical topics.

Each educator who will be evaluated using the external observation instruments must have had access to the self-assessment instrument. This facilitates a process of self-reflection and allows the person to become familiar with the criteria that the tool uses to analyze CSE teaching competencies. This also ensures transparency regarding the analysis process.

After implementing the external observation instruments, we recommend the use of the self-assessment tool as input to review the results of the external observation instruments, and to develop the improvement and competency development plan.

## Getting to know the External Observation Instruments

The instruments should be implemented by people with CSE training and experience, better yet if they have specific experience facilitating CSE education programs. This will be a crucial factor when conducting the observation and even when developing the improvement plan since it ensures that it will be effective and realistic.

Furthermore, the person implementing the external observation instruments should not be a peer and/or direct colleague of the educators participating in the process. The purpose of this is to avoid methodological bias.

We understand that the selection of the person/people who will be implementing the instruments will be based on various factors. Nevertheless, we underscore that the two previously mentioned criteria will facilitate higher quality execution and results of this analysis process.

## Who should implement the External Observation Instruments?

### Document Review Template

The goal of this instrument is the general analysis of materials and documents that the educator prepares prior to leading the CSE program and each of its sessions.

To complete it, the implementer must request from the educator the written planning and educational materials they use or will use to lead the workshop to be observed.

It is important to have not only the planning materials for that workshop but also the entire training plan/curriculum used to work with the same group of participants.

This template must be completed before the observation and the interview with the educator and with participants since questions may arise from it to ask the educator.

## **Session observation**

This instrument is one of the most relevant parts of the process since it entails the direct observation of a session led by the educator. Furthermore, it allows for the observation of their teaching competencies in practice.

Following the structure developed to analyze CSE teaching competencies, this instrument contains the three dimensions to observe, divided into 35 specific criteria in total and that are part of each dimension.

Prior to the session, the person observing should introduce themselves to the facilitator/educator and participants so that they are aware of the observer's role. The observation must be informed and non-participatory in nature.

The observer must stay for the duration of the session.

After the observation, we suggest conducting the assessment and calculating a score. The scale to conduct the final assessment according to compliance with the different items is included below the instrument.

## **Interview with facilitator/educator**

This instrument will serve as an opportunity to complement, clarify, and/or analyze certain aspects that were observed (or not) in the implementation of the previous instruments, in a more direct way.

Although observing a session is most likely the best way to assess CSE teaching competencies, we understand that some of the criteria from the three dimensions are difficult to assess in this setting. Therefore, this interview serves as an opportunity to analyze these criteria directly with the educator.

The interview may be recorded or registered in writing.

## **Interview with participants**

This instrument allows for a more in-depth analysis of the facilitation process since it entails feedback from a second external component: the people learning.

This instrument also allows the implementer to observe the direct impact of the facilitation and to analyze the response and feedback of session participants in a general sense.

Prior to implementing this instrument, it is important to inform the educator and request permission to interview 2-4 participants.

Understanding to what extent participant opinions coincide with the actions and opinions of the educator is crucial.

Interviews may be recorded and/or transcribed.” Note that this sentence appears twice on this page.

### Some notes regarding the instruments

- It is of utmost importance to underline that these instruments work as a set that complement the external observation process and that they are subject to the specificities of the process.
- As with any analytical process, we recognize that there are a series of internal and external factors that may influence the observation process. These may or may not be easily perceived by the person implementing the instrument. Another influencing factor is the fact of observing only one facilitation session and not the entire program.
- This is why we underline the importance of the implementer having prior knowledge of leading CSE programs. This ensures they have critical and broad criteria, avoiding bias resulting from the internal and external factors that may influence the observation process.
- These instruments must be implemented in a single session that is part of a program comprising various sessions, with a minimum of eight hours for all sessions.
- We strongly recommend not observing the first session of the program since there is always a series of complexities in terms of adapting to the group and the response to the first meeting.
- To guarantee the best possible analysis, every process must include as many observation instruments as possible.
- Instruments should be implemented as a whole since the assessment of competencies is the outcome of the combination of results from the implementation of each instrument.
- An assessment must be completed at the end of each instrument, which gives way to a global result of the educator's competencies.

# Instruments

## A. DOCUMENT REVIEW TEMPLATE *(in all cases with and without observation)*

Criteria	Answer Yes= 1   No=0	Comments
1. There is a written planning of the session and the educational materials used.		
2. The session is framed within a broader work plan (curriculum).		
3. The objectives and activities are clear and adapted.		
1. Contemplates the evaluation modality and expected results.		
5. There is a comprehensive approach to CSE. <sup>1</sup>		
6. Considers coordination with families, the community, health services, social services, and others.		
<b>Total Score</b>		

### Assessment according to the total score:

- 0-2 Not developed
- 3-4 Under development
- 5-6 Developed

*Total asesment* .....

<sup>1</sup> Considering the International Technical Guidance on Sexuality Education (UNESCO, UNAIDS, UNFPA, UN Women, UNICEF, and WHO(2018)[6]. "Comprehensive sexuality education is a curriculum-based process of teaching and learning about the cognitive, emotional, physical and social aspects of sexuality. It aims to equip children and young people with knowledge, skills, attitudes and values that will empower them to: realize their health, well-being and dignity; develop respectful social and sexual relationships; consider how their choices affect their own well-being and that of others; and, understand and ensure the protection of their rights throughout their lives." It must: be based on science and critical thinking; be founded on universal human rights, and as part of these, sexual and reproductive rights; be centered on a gender equality and equity approach; recognize diversities; be situated in a life course approach, recognizing people's progressive autonomy; affirm an enriching and positive vision of sexuality; promote the development of sexual citizens; and foster a culture promoting health and the prevention and care of sexual and reproductive health.

## B. OBSERVATION GUIDE

### 1. Generates a suitable environment for CSE learning

**Aspect of the educator to evaluate**

**Answer**  
Yes= 1 | No=0

**Comments**

#### Communication

1. Respects diversity of opinions		
2. Uses inclusive language <sup>2</sup>		
3. Maintains egalitarian treatment		
4. Avoids value judgments		

#### Participation

5. Promotes participation
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#### Performance

6. Considers written planning		
7. Adapts to potential situations that emerge		
<b>Total Score</b>		

#### Assessment according to the total score:

- 0-3 Not developed
- 4-5 Under development
- 6-7 Developed

*Total asesment* .....

<sup>2</sup> Inclusive language refers to any verbal or written expression that preferably uses neutral vocabulary, or it makes the masculine and feminine evident, avoiding generalizations of the masculine for situations or activities where women and men both appear. Gender Inclusive Language Guide from the National Culture and Arts Council of the Government of Chile 2017.



## 2. Adopts a comprehensive approach to CSE

### Aspect of the educator to evaluate

Answer  
Yes= 1 | No=0

### Comments

Analyze if the educator's proposal:

#### *Handles scientifically correct and appropriate content*

1. According to age		
2. According to development		
3. According to culture		

#### *Addresses the dimensions of CSE*

4. Physical		
5. Emotional		
6. Cultural		
7. Avoids value judgments		

#### *Handles scientifically correct and appropriate content*

8. Rights-based		
9. Gender		
10. Cultural perspective		

*Questions stereotypes*

<b>11.</b> Sexual		
<b>12.</b> Racial		
<b>13.</b> Cultural		

*Promotes psychosocial competencies associated with the issues addressed*

<b>14.</b> Expressing emotions		
<b>15.</b> Expressing feelings		
<b>16.</b> Decision-making		
<b>17.</b> Assertive communication		
<b>Total Score</b>		

**Assessment according to the total score:**

0-6      Not developed  
 7-13     Under development  
 14-17   Developed

*Total asesment* .....

### 3. Uses an active, participatory, and culturally-appropriate methodology

**Aspect of the educator  
to evaluate**

**Answer**  
Yes= 1 | No=0

**Comments**

#### *The methodological proposal implemented by the educator*

1. Centers participants, promoting their participation and empowerment.		
2. Provides a proportional balance between explanatory lectures and reflexive group activities.		
3. Seeks to clearly (in an assertive and culturally appropriate way) connect content with the everyday life of the group.		
4. Uses playful dynamics.		

#### *The educator*

5. Knows, shows interest in, clearly explains, and is comfortable with the content they develop.		
6. Promotes active listening and dialogue and considers and takes opinions into account.		
7. Avoids imposing their ideas.		
8. Answers questions (and accepts those for which they do not have an answer).		
9. Engages in a respectful, honest, and constructive way.		
10. Seeks to draw conclusions/ reflections at the end of each activity.		
11. Implements a mechanism to evaluate the session and participant learning.		
<b>Total Score</b>		

### Assessment according to the total score:

- 0-5 Not developed
- 6-9 Under development
- 10-11 Developed

*Total assessment* .....

### Global assessment of competencies:

This is the result of adding the total score of each instrument;  
it will be conducted following the scale below:

- 0-19 Not developed
- 6-9 Under development
- 10-11 Developed

*Total assessment* .....

**Important:** It is important to conduct a global assessment of competencies. However, the assessment of each one enables a more detailed vision of the aspects that the facilitator and/or educator must strengthen. We suggest providing feedback detailing both aspects (assessment per competency and global) to contribute to the development of a precise improvement plan.

## C. INTERVIEWS WITH OBSERVATION

### D.1 Interview with educator/facilitator

- What is your CSE training?
- How long have you been conducting CSE activities?
- From whom and how did the request to conduct this workshop emerge?
- Did you have prior direct contact with someone from the organization/institution or group who asked you to lead this workshop? If so, describe what this contact entailed.
- Did you have prior information about the group? (Characteristics, prior training on CSE, etc.).
- What do you know about the institutional, social, and cultural context in which you are holding the workshop?
- Do you have a standard planning model for the CSE activities, or do you adjust it depending on the specific context?

### General assessment of the interview with observation

This interview must complement the observation positively considering:

- Former CSE training and/or experience
- Prior knowledge of the group and/or the institution and/or context
- Coherence between what was mentioned in the interview and what was observed

#### Assessment scale:

- Not developed (1)
- Under development (2)
- Developed (3)

*Total assessment  
of the interview:* .....

## E.2 Interview with participants

- What did you like most and least about the workshop?
- Were the explanations and content clear and easy to understand? If not, were they confusing and hard to understand? Briefly explain why.
- To what extent were the issues addressed interesting, relevant to your life,
- and useful for your life? Why?
- To what extent did the workshop allow for group participation,, respond to concerns, and respect and consider your opinions?
- Did the workshop allow you to see/understand other aspects of those issues that you had never thought about before? Which ones?
- To what extent were the activities dynamic and entertaining?
- Did you feel comfortable in the workshop?
- How would you rate the work of the facilitator/educator? (excellent, very good, good, fair, bad)
- Would you participate in another workshop led by this person? Would you recommend them to others your age? Why?

### General assessment of the interview

Positively evaluate the presence of the following aspects:

- The explanations and content were clear/easy to understand.
- The content was useful and relevant to your life.
- You feel that there was room for participation/consideration of opinions/questions.
- You found the methodology and activities dynamic/entertaining.

#### Assessment scale:

Not developed (1)

Under development (2)

Developed (3)

*Total asesment  
of the interview:* .....

*Global assessment of the educator's competencies (sum of the assessment of all implemented instruments)*

*Numeric assessment according to the code (\*)*

Document review	
Session observation	
Educator interviews	
Optional participant interviews	
<b>Total assessment (**)</b>	

*(\*) Considering the nominal assessment of each item, complete the template with numbers according to this code:*

Not developed .....1  
 Under development .....2  
 Developed .....3

*(\*\*) The total assessment is the result of the sum of all the instruments according to the following scale:*

Not developed .....1-3  
 Under development .....4-6  
 Developed .....7-9 (or greater when applicable)